



## SENIOR AND DISABLED REAL ESTATE TAX RELIEF APPLICATION

Real Estate Account number as it appears on bill  
# \_\_\_\_\_

Marital Status

- ☐ Single  
☐ Separated  
☐ Divorced  
☐ Widowed

Name of Applicant Owner (Last, First, Middle) Social Security # Date of Birth

Name of Spouse (Last, First, Middle) Social Security # Date of Birth

Property Address \_\_\_\_\_ Telephone Number \_\_\_\_\_  
Number Street Zip Code

Mailing Address \_\_\_\_\_  
Number Street City Zip Code

1. Do you live in the home? ☐ Yes ☐ No If no, list address \_\_\_\_\_
2. Does anyone else live in the home? ☐ Yes ☐ No
3. List all related person living in the home, including children: (proof of 2012 income must be provided).

	Name	Social Security #	Relationship to Owner	Date of Birth
Relative 1				
Relative 2				
Relative 3				

4. Do the property owners own any other Real Estate? ☐ Yes ☐ No  
If so, list address and provide current annual assessment.
5. Did the owners file a 2012 Federal Income Tax Return? ☐ Yes ☐ No  
If yes, you must furnish a copy
6. Is any part of the residence leased or rented to other persons? ☐ Yes ☐ No
7. If a mortgage company collects payment of your Real Estate Taxes, please provide the following:  
Name \_\_\_\_\_ Address \_\_\_\_\_ Loan # \_\_\_\_\_

**Need more  
information?**

**Norfolk Department of Human Services**  
**Mail: 201 E. Little Creek Rd.**  
**Norfolk, VA 23505**  
**Walk in by appointments: 606 W. 29<sup>th</sup> St.**  
**Call: (757) 823-1130**

**Phone: (757) 664-6035**  
**(757) 823-1130**  
**Fax: (757) 664-7535**

**Income Information:** Proof of income must be provided. **If a 2012 federal income tax return was filed, provide a copy.** List annual gross income from all sources as of 12/31/2012 of the owner(s) and all relatives living on the property. Income must be verified for household members listed below.

Section 1 Source of Income	Owner/ Applicant	Spouse/ Co-owner	Relative 1	Relative 2	Relative 3
Social Security					
Retirement Pension(includes Military)					
Rent from Roomers/Tenants					
Interest from Bank Accounts, Bonds					
Dividends & Earnings from Stocks & Bonds					
Wages, Salaries, Bonuses, Investments					
Other Income (specify)_____					
Business Income, Capital Gains					
IRA Distribution					
Veterans and Family benefits					
Workman's Compensation					
Railroad Retirement Act Benefits					
<b>Total &amp; Percentage – Office Use</b>	<b>\$</b>	<b>%</b>			

  

Section 2 – Combined Financial Worth	Owner/Applicant	Spouse/Co-Owner
Cash on hand; Checking Accounts		
Savings, IRA, Retirement Accounts		
Stocks, Bonds, & Trusts		
Certificates of Deposit, Money Market		
Other Real Estate		

  

Vehicles, Boat, RV, Trailers.	Year	Make	Model	Value
Vehicle 1				
Vehicle 2				
Boat/RV				
Boat/Trailer/Camper				
<b>Total</b>				

**Election of Tax Relief options. Answer both questions**

- If you qualify for 100% tax exemption up to the average residential tax and there are taxes remaining, do you elect to defer the balance of your 2013-14 real estate tax?
  - ☐ Yes, defer remaining taxes.
  - ☐ No, bill me for remaining taxes.
- If you qualify for less than 100% relief (i.e., 80% - 20%), you may defer taxes up to the average residential tax multiplied by the percentage of relief calculated. Do you elect to defer that amount?
  - ☐ Yes, defer tax up to the amount allowed.
  - ☐ No, bill me for the entire tax and I opt out of the program.

**Note:** An amount of funding is appropriated for tax relief each year. In the event that the total amount of all approved tax relief applications exceeds this amount, each approved application could have a pro rata reduction as may be necessary to balance the total tax relief appropriation. The proration is applied to all deferred amounts.

**AFFIDAVIT**

I certify that the statements are true and accurate to the best of my knowledge and belief, and I understand that any factors occurring during the taxable year for which this affidavit is filed that have the effect of exceeding or violating the limitations and conditions provided the ordinance shall nullify any relief for the current taxable year and the taxable year immediately following. Any person or persons who shall falsely claim an exemption or shall give information on which an exemption is based shall be guilty of a misdemeanor and upon conviction thereof shall be punished by a fine not exceeding \$1,000.00 or confinement in jail not exceeding twelve months, or both such fine and imprisonment.

Signature \_\_\_\_\_ Date \_\_\_\_\_